

INFORMATION
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**AGENDA ITEM:** Access Services: Expanded Interlibrary Loan Pilot Program

**GENERAL OVERALL PROGRAM UPDATES:**

**CURRENT STATUS:** Based on the Board's June and August 1999 actions to expand the LoC interlibrary loan pilot, staff sent different mailings to three groups of libraries in California:

1. Public libraries
2. Non-public libraries that had already begun participating in the pilot
3. Other non-public libraries

Public libraries received a revised reporting form, along with instructions and lending eligibility guidelines, that reflects the continued CLSA reimbursement for interlibrary loans to CLSA-eligible libraries as well as Library of California reimbursement for loans to additional libraries eligible under LoC. The form features the four types of libraries – one category each for public, academic, and school – plus two categories for special libraries: 1) CLSA-eligible special libraries; and 2) for-profit libraries and non-institutional government libraries, eligible under the Library of California (reimbursements for loans to these libraries will be paid from LoC funds).

Those non-public libraries that had already begun participating in the pilot program also received a revised, simplified form that lists the four library categories. This new form no longer requires reporting libraries to identify the special libraries that have borrowed from them.

The third mailing, consisting of a letter inviting libraries to participate in the interlibrary loan pilot program, was sent to all California non-public libraries listed in the *American Library Directory* (except those already participating). Interested libraries could either request an information packet from the State Library or download the information from the Library of California Web page. In addition to the new forms and instructions, the packet included Library of California interim eligibility standards and a corresponding documentation form, plus the authorization form needed to process reimbursement payments.

In September staff sent the information packet to non-public libraries that had received reimbursement for interlibrary loan under CLSA but had not yet joined the pilot program. Since the pilot is now completely funded from LoC dollars, these libraries must join the pilot program in order to continue to be

reimbursed. A memo included in the mailing asked the libraries to return the *Documentation of Interim Eligibility* form and to start using the new reporting forms. Staff is contacting individual libraries as needed to ensure that the State Library has the necessary documentation on file.

Since the August and September mailings, participation in the pilot has increased from 53 to 106 libraries (as of October 29<sup>th</sup>). Names of all libraries participating in the pilot will be included in the Web database under development that will show library participation in various Library of California programs. Exhibit A shows the current list of participating libraries and their reported ILL transactions for July through September 1999. Exhibit B shows the percentage of libraries participating, loans to libraries by type of library, and the top five libraries (in terms of transactions reported) for the first two quarters of the pilot.

Total Library of California funds expended on the ILL pilot program thus far:

April – June	\$ 81,245.70
July – September	<u>\$103,892.76</u>
Total	<u><u>\$185,138.46</u></u>

At its August meeting, the Board expressed an interest in knowing the different kinds of materials represented in the number of ILL transactions reported under the pilot program. Staff hopes that a sample of participating libraries will be able to collect and report this information during the first three months of 2000, which should provide the Board with a good indication of what kinds of materials actually are lent.

#### **RELATED ISSUES TO COME BEFORE THE BOARD IN THE FUTURE:**

1. Update on activity levels of the ILL pilot program.
2. Final consultant's report on funding options for ILL and direct loan.
3. What funding formulas are appropriate for the interlibrary loan component of Library of California access services?
4. Report on kinds of materials loaned under the ILL pilot program.
5. How will the direct loan component of Library of California access services be initiated and funded?
6. What onsite, patron referral services should be supported under the Library of California, and what funding formulas are appropriate?
7. How will electronic direct access services be defined, authorized, delivered, and funded?

Relevant Committee: Access Services  
Staff Liaison: Tom Andersen

# INTERLIBRARY LOAN PILOT PROJECT

## APRIL – SEPTEMBER 1999

	<i>Participating Libraries</i>		<i>Total Loans</i>		<i>%</i>	
	April – June	July – Sept.	April - June	July – Sept.	April - June	July – Sept.
Academic	46	82	37,292	40,375	99.4	88.9
Special	6	8	210	280	0.6	0.6
School	1	3	17	4,747	0.04	10.5
<b>Total</b>	<b>53</b>	<b>93</b>	<b>37,519</b>	<b>45,402</b>	<b>100.0</b>	<b>100.0</b>

<i>Loans To</i>	<i>Total</i>		<i>%</i>	
	April – June	July - September	April - June	July – September
Academic	30,672	26,541	81.8	58.5
Public	6,116	17,409	16.3	38.3
Special	605	883	1.6	1.9
School	126	569	0.3	1.3
<b>Total</b>	<b>37,519</b>	<b>45,402</b>	<b>100.0</b>	<b>100.0</b>

<i>Top 5 Libraries April – June</i>			<i>Top 5 Libraries July – September</i>		
	Loans	% of Total Loans		Loans	% of Total Loans
San Diego State University	6,584	17.5	San Diego State University	5,082	11.2
San Jose State University	4,351	11.6	Modoc County Super. of Schools	4,740	10.4
CSU Long Beach	3,142	8.4	San Jose State University	4,372	9.6
Cal Poly Pomona	2,581	6.9	CSU Long Beach	2,716	6.0
UC Riverside	2,499	6.7	UC Riverside	2,354	5.2
<b>Total</b>	<b>19,157</b>	<b>51.1</b>	<b>Total</b>	<b>19,264</b>	<b>42.4</b>

No activity reported (April – June):

Academic:	4
Special:	3
School:	<u>0</u>
	7

No activity reported (July – September):

Academic:	13
Special:	3
School:	<u>1</u>
	17